

**ATTACHMENT 4**

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**BUDGET FORMAT FOR IMPLEMENTATION PLAN**

Titles (i.e., Activity Type A) under Main Categories (i.e., Labor, etc.) may be changed and expanded or contracted in number, but itemization should be maintained to an equivalent degree, and Main Categories (i.e., Labor, as set out in Policy Manual) are to be included as are. If the Category cost is \$5000 or less, further itemization is not required.

**Program Budget**

| <b>Item</b>   | <b>\$</b> | <b>Methodology for Allocation<br/>(Footnote if necessary)</b> | <b>Percentage of Total Program Budget</b> |
|---|-----------|---|---|
| <b>Administrative Costs</b>                                 |           |   |   |
| Labor   |           |   |   |
| (Activity Type A) e.g., Program Planning                    |           |   |   |
| (Activity Type B) e.g., Program Design                      |           |   |   |
| (Activity Type C) e.g., Program Implementation              |           |   |   |
| (Activity Type D) e.g., Incentive Processing                |           |   |   |
| <b>Subtotal Labor</b>                                       |           |   |   |
| Benefits (note if this amount is to be recovered elsewhere) |           |   |   |
| # of staff @ \$xx   |           |   |   |
| # of staff @ \$yy   |           |   |   |
| <b>Subtotal Benefits</b>                                    |           |   |   |
| Overhead  |           |   |   |
| Type A (e.g., Business Resources)                           |           |   |   |
| Type B (e.g., Corporate Services)                           |           |   |   |
| Type C (e.g., Security)                                     |           |   |   |
| Type D (e.g., Transportation Services)                      |           |   |   |
| Type E (e.g., Information Technology)                       |           |   |   |
| Type F (e.g., Procurement and Material Management)          |           |   |   |
| Type G (Shops Services and Instrumentation Division)        |           |   |   |
| <b>Subtotal Overhead</b>                                    |           |   |   |
| Travel costs  |           |   |   |
| Type A (e.g., Mileage and Parking)                          |           |   |   |
| Type B (e.g., Meals)  |           |   |   |
| Type C (e.g., Lodging)                                      |           |   |   |

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| Type D (e.g., Conference Activities)  |  |  |  |
| Type E (e.g., Training Activities)  |  |  |  |
| <b>Subtotal Travel costs</b>  |  |  |  |
| Reporting costs   |  |  |  |
| Report 1  |  |  |  |
| Report 2  |  |  |  |
| <b>Subtotal Reporting costs</b>   |  |  |  |
| Materials & Handling  |  |  |  |
| (e.g., Equipment Purchase)  |  |  |  |
| (e.g., Equipment lease/maintenance)   |  |  |  |
| (e.g., Postage)   |  |  |  |
| (e.g., Organization Support)  |  |  |  |
| <b>Subtotal Materials &amp; Handling</b>  |  |  |  |
| General and Administrative costs  |  |  |  |
| Type 1 (e.g., Regulatory Support)   |  |  |  |
| Type 2 (Mgmt/Admin support)   |  |  |  |
| Type 3 (Communications)   |  |  |  |
| <b>Subtotal General and Administrative costs</b>  |  |  |  |
| Subcontractor Administrative costs<br>(administrative only, report other subcontractor costs in the appropriate category) |  |  |  |
| Labor   |  |  |  |
| Benefits  |  |  |  |
| Overhead  |  |  |  |
| Travel costs  |  |  |  |
| Reporting costs   |  |  |  |
| Materials & Handling  |  |  |  |
| General and Administrative costs  |  |  |  |
| <b>Subtotal Subcontractor Administrative costs</b>  |  |  |  |
| <b>Total Administrative Costs</b>   |  |  |  |
| <b>Marketing/Advertising/Outreach Costs</b>   |  |  |  |
| Activity A (e.g., 6 brochures, 1000 copies, @ \$10 each)  |  |  |  |
| Activity B (e.g., # television spots @ \$)  |  |  |  |
| Activity C (e.g., vendor training)  |  |  |  |
| <b>Total Marketing/Advertising/Outreach Costs</b>   |  |  |  |
| <b>Direct Implementation Costs</b>  |  |  |  |
| Itemized financial incentives   |  |  |  |
| • E.g., 100 water heaters @ \$75 each   |  |  |  |
| <b>Subtotal Financial Incentives</b>  |  |  |  |

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| Itemized installation costs                                    |  |  |  |
| • E.g., 100 14 SEER Central AC units @ \$2000 each (installed) |  |  |  |
| <b>Subtotal Installation costs</b>                             |  |  |  |
| Itemized activity costs  |  |  |  |
| • E.g., 100 walk-through audits @ \$500 each                   |  |  |  |
| <b>Subtotal Activity costs</b>                                 |  |  |  |
| <b>Total Direct Implementation costs</b>                       |  |  |  |
| <b>Evaluation, Measurement and Verification Costs</b>          |  |  |  |
| Labor  |  |  |  |
| (Activity Type A)  |  |  |  |
| (Activity Type B)  |  |  |  |
| <b>Subtotal EM&amp;V Labor</b>                                 |  |  |  |
| Overhead   |  |  |  |
| Type A   |  |  |  |
| Type B   |  |  |  |
| Type C   |  |  |  |
| Type D   |  |  |  |
| <b>Subtotal EM&amp;V Overhead</b>                              |  |  |  |
| Travel costs   |  |  |  |
| Type A (e.g., Mileage and Parking)                             |  |  |  |
| Type B (e.g., Meals)   |  |  |  |
| Type C (e.g., Lodging)   |  |  |  |
| Reporting costs  |  |  |  |
| Report 1   |  |  |  |
| Report 2   |  |  |  |
| <b>Subtotal EM&amp;V Reporting Costs</b>                       |  |  |  |
| Materials & Handling   |  |  |  |
| (e.g., Equipment Purchase)                                     |  |  |  |
| (e.g., Equipment lease/maintenance)                            |  |  |  |
| (e.g., Postage)  |  |  |  |
| <b>Subtotal Materials &amp; Handling</b>                       |  |  |  |
| General and Administrative costs                               |  |  |  |
| Type 1   |  |  |  |
| Type 2   |  |  |  |
| Type 3   |  |  |  |
| <b>Subtotal General and Administrative costs</b>               |  |  |  |
| <b>Total Evaluation, Measurement and Verification Costs</b>    |  |  |  |

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| <b>Other Costs</b>  |  |  |  |
|---|--|--|--|
| Itemized, may include: <ul style="list-style-type: none"><li>• Profit</li><li>• Financing costs</li></ul> |  |  |  |
| Subtract Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)  |  |  |  |
| <b>Budget Grand Total</b>   |  |  |  |

**(END OF ATTACHMENT 4)**